


AOC-856 Doc. Code: SET Rev. 4-02 Page 1 of 2 Commonwealth of Kentucky Court of Justice www.kycourts.net KRS 387.175, 387.670, 387.710 395.610-.657; 395.990	 PERIODIC/FINAL SETTLEMENT OF GUARDIAN/CONSERVATOR FOR <input type="checkbox"/> MINOR <input type="checkbox"/> DISABLED PERSON	Case No. _____ Court <u>District Probate</u> County _____
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Notice to Guardian/Conservator: File this Settlement one (1) year after appointment and annually thereafter. If the net estate is \$5,000 or less, file this Settlement every two (2) years after the original report.

IN RE: Estate of _____, a ☐ Minor under 18 ☐ Disabled Person.

Comes _____, appointed as ☐ Guardian ☐ Conservator of the above estate on _____, 2____. This ☐ Periodic ☐ Final Settlement indicates, by itemized statement and supported by receipts and vouchers, the assets received and disbursements made since the Inventory or last Settlement was filed. It is submitted pursuant to:

☐ **KRS 387.710** OR ☐ **KRS 387.175 and 395.610 - 395.657**

ASSETS & INVESTMENTS

(Include anything of value to the estate including government benefits, Social Security and SSI pension plan benefits, savings and checking accounts, certificates of deposit, all personal property, rents from real estate, and proceeds from the sale of real estate and personal property. Attach additional sheets of paper if necessary).

<u>ITEM</u>	<u>AMOUNT</u>
_____	\$ _____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
TOTAL ASSETS RECEIVED:	\$ _____

<u>DISBURSEMENTS</u>	<u>AMOUNT</u>
_____	\$ _____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
TOTAL DISBURSEMENTS MADE:	\$ _____

<u>BALANCE</u>	ASSETS LESS DISBURSEMENTS:	\$ _____
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For Periodic Settlements - carry balance forward to next report.
 For Final Settlements - indicate to whom balance was paid and attach receipt.

IN PERIODIC SETTLEMENTS:

PLAN FOR PRESERVING AND MAINTAINING ESTATE *(not to be filled out if estate has net value of \$5,000 or less)*

IN FINAL SETTLEMENTS:

UNPAID CREDITORS - ALLOWED CLAIMS

[illegible]

CREDITORS - DISALLOWED CLAIMS

[illegible]

Above-named Guardian/Conservator submits this Settlement to the Court, and if a Final Settlement, asks that the Surety be discharged.

Guardian's/Conservator's Signature

Subscribed and sworn before me on _____, 2____. My commission expires: _____,
2____.

Name/Title